

# Assessors' Association of Pennsylvania Policies and Procedures

## Article I-- Definitions

**Section 1--** The following words and phrases used in this policy and procedures shall have the meaning given to them in this section unless context clearly indicates otherwise:

**Association** – Assessors' Association of Pennsylvania

**Board** -- Board of Governors of the Assessors' Association of Pennsylvania

**Officers** -- Shall include the President, President-Elect, Vice President, Treasurer, Secretary and Immediate Past President. The current Elected Officers shall also be known as the Executive Board. *(Amended July 14, 2006)*

**Staff** --The employees contracted through the County Commissioners Association of Pennsylvania

**Section 2--**The Association adheres to the AAP Code of Ethics and Standard of Professional Conduct. *(See Addendum 1)*

## Article II-- Meeting/Minutes

### Section 1

- a. The Annual Meeting, which shall include a membership meeting, shall be held in the spring at a site approved by the AAP Board of Governors. The Annual Meeting shall rotate between three Conference Regions, beginning in 2019 in the West Region, 2020 in the Central Region, 2021 in the East Region and continue in this rotation. The AAP Board of Governors should choose a site several years in advance in an effort to lock in prices to save costs for the AAP and its members. *(Amended November 2, 2016)*
- b. The Conference Regions for Spring Conferences are as follows:
  1. West Region – Allegheny County, Armstrong County, Beaver County, Butler County, Clarion County, Crawford County, Erie County, Fayette County, Forest County, Greene County, Indiana County, Jefferson County, Lawrence County, Mercer County, Somerset County, Venango County, Warren County, Washington County and Westmoreland County.
  2. Central Region – Adams County, Bedford County, Blair County, Cambria County, Cameron County, Centre County, Clearfield County, Clinton County, Cumberland County, Dauphin County, Elk County, Franklin County, Fulton County, Huntingdon County, Juniata County, Lycoming County, McKean County, Mifflin County, Northumberland County, Perry County, Potter County, Snyder county, Tioga County, Union County and York County.
  3. East Region – Berks County, Bradford County, Bucks County, Carbon County, Chester County, Columbia County, Delaware County, Lackawanna County, Lancaster County, Lebanon County, Lehigh County, Luzerne County, Montgomery County, Monroe County, Montour County, Northampton County, Philadelphia County, Pike County, Schuylkill County, Sullivan County, Susquehanna County, Wayne County and Wyoming County. *(Added November 2, 2016)*
- c. The Fall Meeting with seminars shall be held at a site previously selected by the President.
- d. The Secretary shall be responsible for the minutes of any meetings of the Association, and the Board.
- e. A no smoking policy is in effect for all AAP functions.

## **Article III - Board of Governors**

**Section 1--**The Local Chapters having representation to the Association Board is as follows (two members each with staggered two-year terms):

- a. North East Chapter
- b. North Central Chapter
- c. North West Chapter
- d. South East Chapter
- e. Laurel Mountain Chapter
- f. South Central Chapter

### **Section 2-- Expenses**

- a. Mileage, meals and housing shall be paid when attending meetings of the Board or its committees except meetings held in conjunction with the Annual Conference or the Fall meeting. Board members, who live less than 50 miles (one way) from the Board meeting site, are not entitled to housing expenses. Members are encouraged to travel together whenever practical.
- b. All housing and meals of the President and their spouse shall be paid for the Annual and Fall Meeting(s) during their term.
- c. Expenses of the President shall be paid when traveling to Chapter meetings throughout the State. Expenses include mileage, meals and housing.
- d. The Board of Governors may designate up to two individuals to attend the IAAO Annual Conference or the NRAAO Annual Conference, provided that the annual budget supports the cost of attendance at the conference. Expenses do not include Pre-Conference and Post Conference Seminars or expenses while attending those seminars. Reimbursable expenses shall include meals, when not provided as part of the conference registration, housing for the days of the conference and travel expenses, with the costs reimbursed calculated at the lowest transportation mode. *(Amended July 11, 2014)*
- e. Mileage covered by the Association shall be reimbursed at the current IRS rate per mile. Travel expenses will be reimbursed at the most economical way of traveling.
- f. All requests for reimbursement for expenses must be substantiated.
- g. The President is entitled to a gift when leaving office not to exceed \$250.
- h. Board gifts that are purchased from Association funds must be approved by three Officers.

## **Article IV-- Legal**

### **Section 1--Solicitor**

- a. The Board may appoint a Solicitor for the Association as stated in Article III, Section 5 of the Association Constitution.
- b. Upon the approval of the Board, the Association Solicitor shall be paid an annual retainer.
- c. The Solicitor's expenses including housing, meals and mileage shall be paid when attending Board meetings, the Annual Meeting and/or the Fall meeting (when their attendance is requested).
- d. Approval of three Officers is required for emergency legal action.
- e. With Board approval, additional legal expenses shall be paid.
- f. If a member needs to contact the Solicitor concerning a matter that affects the Association, they must contact an officer of the association who will then channel appropriate requests to the Solicitor.

## **Article V - Committees**

### **Section 1**

The following standing committees are hereby established by the Board. The current AAP President shall appoint committee members. The appointment of all committee chairs is subject to Board approval.

- a. Education
- b. Government Information
- c. Budget
- d. Audit
- e. Nominating
- f. Awards
- g. Conference
- h. Health and Welfare
- i. Geographic Information Systems (GIS)
- j. Policy and Procedure
- k. Clean and Green
- l. Assessment Law Committee
- m. Tax Claim Group

### **Section 2-- Expenses**

If possible, all committee meetings shall be held in conjunction with the Annual Conference, the Fall Meeting or the scheduled Board meetings. No expenses will be paid for meetings held in conjunction with the Annual Conference or Fall Meeting.

### **Section 3-- Education Committee**

- a. The Education Committee organizes and regulates all educational programs and classes conducted by the Association.
- b. Each Local Chapter is entitled to one representative to the Education Committee.
- c. All four AAP Basic Course fees shall be pre-approved by the Board.
- d. Instructors shall be trained under the guidance of the Education Committee.
- e. AAP Basic Course Instructors and trainees fees shall be determined by the Board.
  - 1. AAP Instructor Trainee Fee Schedule
    - i. Phase I – Upon approval of the AAP Education Committee, the Instructor Trainee will sit in on the course they wish to teach. The AAP will pay room, board and ground transportation only.
    - ii. Phase II – The Instructor Trainee will sit in on the course they wish to teach a second time and be expected to teach at least eight (8) hours of the course material. The AAP will pay room, board and ground transportation along with a rate equal to one half (1/2) of the full instructor's fee.
    - iii. Phase III – The Instructor Trainee will teach the complete course under the observation of the Certified Instructor. The AAP will pay room, board, ground transportation and the full certified instructor's fee.
    - iv. The Certified Instructor shall make a recommendation to the AAP Education Chairperson(s) that the Instructor Trainee be accepted as a Certified Instructor of the course, repeat Phase III or not be considered as an instructor.
  - 2. Certified Instructor's fees are approved on a per diem rate set by the AAP Board of Governors. The Certified Instructor's fee includes a flat rate preparation fee, per diem rate per day of instruction, room and board. (*Amended April 29, 2008*)
  - 3. Qualifications for instructors and instructor trainees to teach the "90 hours of basic courses of study" required for the initial CPE certification (Act 28 of 1992/Assessor's Certification Act, 63 P.S. § 458.1 et seq).

- i. The individual must be a member in good standing of the Assessors' Association of Pennsylvania, as described in Article II, Section 1 of the Constitution of the Association.
  - ii. The individual must maintain a current Certified Pennsylvania Evaluator designation as provided by the Commonwealth of Pennsylvania, State Board of Certified Real Estate Appraisers. *(Amended April 23, 2013)*
- f. Distribution of Auction Money -- Local Chapter Educational Reimbursement.
  - 1. If a Chapter organizes, submits and receives an approval for two or more recertification hours from the State Board of Certified Real Estate Appraisers, that Chapter will receive \$150.
  - 2. Classes/seminars receiving AAP certificates will be open to any member who is both a member in good standing with the Assessors' Association of Pennsylvania and one of the six chapters of the AAP and will not be subject to any additional charge above the regular chapter member cost.
  - 3. The maximum grant amount a Chapter can receive from the Assessors' Association of Pennsylvania in one (1) calendar year is \$450.
  - 4. Requests for reimbursements must be sent to the AAP Director or designee for approval. *(Section 3(f) (Amended November 12, 2003)*
  - 5. At the end of the fiscal year, the cost of the AAP's Crime Insurance Policy will be deducted from any remaining Auction funds before they are dispersed equally to the Chapters. The funds shall be distributed at the next Board of Governors' meeting. *(Added November 2, 2005) (Amended January 20, 2012)*

**Section 4-- Government Information Committee**

- a. The Chair is responsible for submitting updates to the Board on new and pending legislation before the House of Representative and the Senate of Pennsylvania.
- b. Each Local Chapter may submit one representative to the Government Information Committee.

**Section 5-- Budget Committee**

The Budget Committee prepares a draft budget to present to the Board for approval.

**Section 6-- Audit Committee**

- a. The Audit Committee members are responsible for auditing the AAP books. The Committee shall report audit findings to the Board and membership (Annual Meeting). Upon the approval of the Board, an outside audit may be requested.
- b. The Audit Committee shall review annual Chapter audits that are submitted in accordance with Article VIII, Section 2. *(Added January 20, 2012)*

**Section 7-- Nominating Committee**

- a. The Nominating Committee functions under the guidelines set in the Association Constitution in Article V, Section 5.
- b. The Chair of the Nominating Committee shall be the most recent active Past President.

**Section 8--Awards Committee**

- a. The Awards Committee shall determine the winners of the following awards (subject to the Executive Board's approval/veto powers): *(Amended July 14, 2006)*
  - 1. Naessig Award: Named after Carl W. Naessig, second President of AAP. This award is given for meritorious service to the assessment profession and the Assessors' Association of Pennsylvania.
  - 2. Hanisits/Hettinger Award: Named after Robert Hanisits, 40th President of AAP and Alfred K. Hettinger, Esquire, former AAP Solicitor. This award is given for the enhancement of assessment education in the Assessors' Association of Pennsylvania. *(Amended May 28, 2015)*
  - 3. Chudy Award: Named After Michael M. Chudy, first president of AAP. This award is given for the best assessment article in the *AAP Journal* during the past year.

4. Garrity Award: Named after Past President Thomas P. Garrity. This award is a one-year paid membership in the International Association of Assessing Officers. The recipient is selected by a Local Chapter on a rotating basis.
  5. Special Awards: Special awards may be granted at the discretion of the Awards Committee with Board approval.
  6. Special President's Award: The President has at his/her discretion the ability to give a special award.
- b.** The Committee shall present the following Service Awards to members in good standing for service in the county or municipal assessment field:
1. Trailblazer for 20-29 years
  2. Board of Governor's Award for 30-39 years
  3. President's Award for 40 years or over
  4. Golden Achievement Award for 50 years or more of service. *(Added July 15, 2016)*

**Section 9-- Conference Committee**

- a.** The Conference Committee is responsible for program planning for the Annual Conference and the Fall Seminars.
- b.** The Vice President of the Association shall act as the Chair of the Conference Committee. In the event of a vacancy in the office of Vice President, the President shall appoint a Chair of the Conference Committee, who shall be approved by the Board to carry out the duties of the Vice President as it relates to the responsibilities of this committee. *(Amended July 13, 2012)*
- c.** The Chair shall designate additional members to the Committee as needed.
- d.** Hospitality rooms at all AAP conferences will close at 1:00 a.m.

**Section 10 -- Health and Welfare Committee**

- a.** The purpose of this committee is to promote and maintain unity and emotional support for AAP members. Our policies and procedures provide a method of acknowledgement and comfort to our members and their families due to a loss of life, a catastrophic loss affecting lifestyle or a serious illness. Above all, the committee will respect and give special attention to AAP member requests concerning publicity and confidentiality.
- b.** In order to be current with what is occurring with members, each chapter will assign a contact that may report to any person on the Health and Welfare Committee situations or circumstances warranting Committee attention. It is to be noted that notification these situations will also be accepted and appreciated from anyone in the AAP.
- c.** The Chair shall report on committee activities to the Board at each seasonal Board meeting as applicable. Activities will also be reported in the AAP Journal to encourage prayers and/or well wishes made by other members.
- d.** The Committee will strive to set guidelines and respond accordingly to situations in a humanitarian fashion. Committee will respect and exercise discretion for confidentiality concerns. Examples of situations that may be reported to the Committee are: Accident, surgery, hospitalization, death, retirement, engagement and weddings.
- e.** The Committee shall contact the AAP Executive Director, or designee, for the processing of any mailings and deliveries. Such examples are cards and flowers.  
*(Section added January 2003.)*

**Section 11 -- Geographic Information Systems (GIS) Committee** *(Added July 14, 2006)*

- a.** The GIS Committee shall report to the Board.
- b.** The AAP GIS Committee is responsible for gathering relevant information pertaining to all aspects of GIS and to provide this information to the AAP membership.
- c.** The Committee shall become a resource of information on GIS hardware, software, techniques, companies, agencies, funding sources and any other additional information relating to the GIS process. *(Section a. and b. added May 1, 2007.)*

## **Section 12 -- Policy and Procedure Committee**

The Policy and Procedure Committee is responsible for maintaining and updating the Policies and Procedures Document. The Committee is responsible for creating and recommending amendments to the Policies and Procedures. Those amendments are presented to the Board for consideration in accordance with their procedures. When changes are approved by the Board, the Committee will update the document and forward it to the AAP staff for dissemination to the Board members. *(Section added November 1, 2006.)*

## **Section 13 -- Clean and Green Committee**

The Clean and Green Committee is responsible for working as liaisons for the AAP with the Pennsylvania Department of Agriculture in an advisory role reviewing changes to the Clean and Green Law and regulations. The Committee also works in an advisory capacity to our membership as they implement the Clean and Green Program in their counties. *(Section added November 1, 2006.)*

## **Section 14 -- Assessment Law Committee**

The Assessment Law Committee's purpose is to review suggestions and make recommendations toward improving assessment law in Pennsylvania. The Committee presents its recommendations to the Board. *(Amended [name changed] July 16, 2010)*

## **Section 15 -- County Commissioners Association**

The President shall appoint a liaison to the County Commissioners' Association of Pennsylvania. *(Amended January 13, 2006)*

## **Section 16 -- AAP Board of Appeals Monitoring Procedures**

- a. All AAP sponsored sessions for recertification credit will be monitored by two designated active members to control entrance into and exit from the classroom. The education committee shall instruct the monitors in the proper procedures. Beyond the normal assigned breaks, each student will be allowed ten minutes during the morning session and ten minutes during the afternoon session to be used towards late arrivals and/or unscheduled breaks not to exceed ten minutes per session.
- b. Students will be required to sign out and sign in with the monitor noting the times. The official starting time for class shall be the advertised starting time. An official clock/timepiece for each class will be used to record all individual breaks and assigned breaks.
- c. Failure to comply with this procedure will result in not being issued a certificate for the seminar. *(Amended January 13, 2006.)*
- d. Requests for Certificates by non-AAP members will require a \$10.00 processing fee, payable to the AAP, either directly to or through the local education chapter. *(Added November 2, 2005)*
- e. The education committee shall instruct the monitors in the proper procedures. *(Added November 2, 2005)*

## **Section 17 -- AAP Board of Appeals**

- a. The Board of Appeals will consist of three (3) active members and one (1) active member alternate to be appointed by the AAP President and approved by the AAP Board.
- b. Appeals from the decision of the designated monitors not to issue a certificate of completion must be submitted with all the facts in writing within ten (10) working days to the AAP Board of Appeals. Written review and final action by the Board of Appeals will be given within thirty (30) days. Copies will be furnished to the student, the President and the Chair(s) of the Education Committee.
- c. In the event that the student is dissatisfied with the decision of the AAP Board of Appeals, the student may petition The President and the Chair(s) of the Education Committee within ten (10) working days. The President and the Chair(s) of the Education Committee may pick an additional Officer, so the total may be three people. This group shall be called the AAP Executive Board of Appeals. Final action by the Executive Board of Appeals will be given within thirty (30) days. *(Section added January 13, 2006)*

## **Section 18 – Tax Claim Group**

- a. The committee is created to aid assessors, who have been tasked with the responsibility of the County's Tax Claim Bureau.
- b. The committee will provide education opportunities to promote greater insight, transitioning between assessment and tax claim duties.  
(Section added July 10, 2015)

## **Article VI -- Conference Registration**

**Section 1 -- General** - The AAP conducts several Conferences and special meetings during the course of the year. Because these meetings require detailed planning, including scheduling sessions, blocking certification coursework, and guaranteeing housing and meal functions, the Association must establish clear policies and deadlines for member registration for these events. The Association's intent is to make a policy that is fair both to the membership and to the Association, and recognizes the responsibilities of our professional staff.

- a. Registration Types
  - 1. Pre-Registrations are those received in advance of the Conference.
  - 2. On-Site registrations are those received at the Conference. The AAP Board may establish, in advance of the meeting a premium for on-site registrations.
- b. Payment - The AAP requests advance payment of registration, but will permit members in good standing to be billed.
- c. Cancellation - A registration may be canceled at any time in advance of the Conference, but members are cautioned that late cancellations may affect eligibility for refunds. Eligibility for refunds due to cancellation of registration is as set in this policy. If the Conference is canceled by the AAP, a full refund will be issued within thirty days of the cancellation.
- d. Refunds - Refunds will be issued for registration cancellations received no later than two weeks in advance of the Conference. There is a \$25 administration fee for each refund. No refunds will be made for registration cancellations received after the two-week deadline except in cases of personal family emergency.
- e. Substitutions - Substitutions are permitted up to two weeks in advance of the Conference. Due to certification course scheduling requirements, substitutions received later than two weeks in advance of the Conference will be charged a \$25 administration fee for each substitution except in cases of personal family emergency.
- f. No-Shows - All registered no-shows will be billed. (Added July 14, 2006)

## **Article VI -- Staff**

### **Section 1**

- a. The Board may contract service of an Executive Director as stated in Article IV, Section 2f of the Association Constitution.
- b. Administrative duties may be provided by the people and/or the agency designated by the Board.

## **Article VII -- Association Funds**

**Section 1 --** The Board shall direct the staff to carry out all financial responsibilities of the association.

## **Article VIII – Crime Insurance Policy**

**Section 1 --** The AAP shall purchase crime insurance that will cover the AAP and its Chapters, protecting them from loss of funds by a criminal action.

**Section 2** -- The AAP requires that each chapter perform an annual audit of its finances.

- a. The audit shall be conducted by chapter members other than those individuals that have control of the finances, i.e., Treasurer, Assistant Treasurer, or other member that signs for the distribution of chapter funds.
- b. A copy of the annual audit shall be submitted to the AAP upon its completion by March 31<sup>st</sup> and will be reviewed by the AAP Audit Committee. *(Amended May 3, 2016)*
- c. AAP will deduct the cost of the insurance at the end of the fiscal year from the remaining Education Auction Funds before they are distributed to the Chapters. *(Added January 20, 2012)*

## **Article IX – AAP List Serve**

- a. The AAP acknowledges that there are many forms of electronic communication. The AAP sanctions and sponsors only the e-mail list server known as [AAP@yahogroups.com](mailto:AAP@yahogroups.com).
- b. Active members, honorary members, past presidents and staff of the AAP are approved for this service. Service will be extended with a request to the designated AAP staff person. *(Amended May 4, 2017)*
- c. The AAP List Serve has been set up to create an electronic link to active members, honorary members, past presidents and staff of the AAP throughout the State, so that they may easily share ideas and expertise. *(Amended May 4, 2017)*
- d. Abuse of the List Serve is not permitted. The focus of the List Serve is tax assessment and closely related topics. Using the List Serve for any other purpose is improper and could result in loss of access to the service. *(Added April 29, 2008)*

## **Article IX -- Amendments**

**Section 1** -- The Policies and Procedures may be amended at any time by the Board.

**Section 2** -- Any such amendments must be submitted in writing twenty (20) days prior to the Board meeting at which they are to be considered.

**Section 3** -- Approval shall be by a majority vote of the Board.

**Amended and Approved – May 4, 2017.**



## **AAP CODE OF ETHICS AND STANDARDS OF PROFESSIONAL CONDUCT**

The purpose of this Code of Ethics and Standards of Professional Conduct are to establish ethical and professional guidelines for assessing officials and other members of the Assessor's Association of Pennsylvania (AAP) and to set forth the standards by which to judge an AAP member whose conduct is in question. Members shall conduct themselves in a manner that will reflect favorably on themselves, the appraisal profession, the property tax system and the AAP, and avoid any action that could discredit themselves or these entities.

### **1. Performance**

Perform their duties in accordance with applicable laws and regulations and apply them uniformly and fairly. Perform all appraisal or other assessment-related assignments to the best of their ability and in accordance with the Uniform Standards of Professional Appraisal Practice adopted by the AAP and the State Laws.

### **2. Access to Information and Records**

Make available all public records in their custody for the public review unless access to such records is specifically limited or prohibited by law, or the information has been obtained on a confidential basis and the law permits such information to be treated confidentially. Make every effort to inform the public about their rights and responsibilities under the law and the property tax system.

### **3. Respectful Attitude**

Maintain an open, courteous and respectful attitude in their dealings with the public and require the same of their subordinates.

### **4. Public Officials**

Cooperate with public officials to improve the efficiency and effectiveness of the property tax in particular and public administration in general.

### **5. Conduct and Propriety**

Conduct their duties and activities in a manner that will reflect credit upon themselves and their profession. Members shall avoid the appearance of impropriety.

### **6. Professional Qualifications**

Claim no professional designation unless authorized by the conferring organization, whether the claim be oral or written, nor claim qualifications that are not factual or may be misleading. Strive to increase knowledge and improve professional skills.

### **7. Recognition**

Give full credit to the source of any material quoted or cited in writings or speeches.

### **8. Prohibited Activities**

Accept no appraisal or assessment-related assignment that could reasonably be construed as being in conflict with their responsibility to their jurisdiction, employer or client or in which they have an unrevealed personal interest or bias or which they are not qualified to perform.

### **9. Contingent Compensation**

Accept no appraisal engagement for which their compensation is contingent upon or influence by any condition that could impair their objectivity, including but not limited to:

- (a) Reporting a predetermined conclusion or recommendation of value,
- (b) The amount of the value estimate,
- (c) The amount of a reduction in taxes,
- (d) Any other similar action or result.

**10. Advertising and/or Solicitation**

Use no advertising or promotion to solicit assessment-related assignments that are not totally accurate and truthful, and avoid using, misleading claims or promises of relief that could lead to loss of confidence in appraisal or assessment professionals by the public.

**11. Reporting Unethical Practices**

Report to AAP any unethical practices or other actions by AAP members which reflect discredit upon the AAP or upon the appraisal or assessment profession.

**12. AAP Officers and Board of Governors**

Cooperate fully with the Executive Board, Professional Ethics Committee and staff of the AAP in all matters relating to the enforcement of this code.

**13. Responsibility of Membership**

Subscribe to this Code of Ethics and Standards of Professional Conduct and the Constitution of the AAP as they may be amended from time to time.

**14. Discrimination and Disabilities**

AAP does not discriminate on the basis of race, sex or color. AAP members also support the American with Disabilities Act.